



# *Health Services in the Ocean State*



An Analysis of Employment and Wages in  
Rhode Island's Health Care Industries

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*A Publication of the:*

**Labor Market Information Unit**

**Rhode Island Department of Labor and Training**

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# **Rhode Island Department of Labor and Training**

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# Introduction

*The Labor Market Information Unit of the  
Rhode Island Department of Labor and Training proudly presents:*

## **Health Services in the Ocean State**

*An Analysis of Employment and Wages in Rhode Island's Health Care Industries*

Health Services has been one of the fastest growing segments of the Rhode Island economy during recent years, adding more than 8,600 jobs between 1992 and 2002. This 19.0 percent employment increase can be attributed to a number of factors, including an increased demand for medical services by an aging population and advances in medical technology. Today, Health Services represents the largest major industry group within the Ocean State's private sector.

Using information collected by the Rhode Island Department of Labor and Training, [Health Services in the Ocean State](#) analyzes the sector's growth in employment and annual wages during the past decade and presents industry and occupational employment projections for the coming decade.

Employers, jobseekers, industry analysts, policymakers, and community and workforce development personnel should find this publication a useful tool in discovering where Rhode Island's Health Services industries have been...and where they are going in the future.



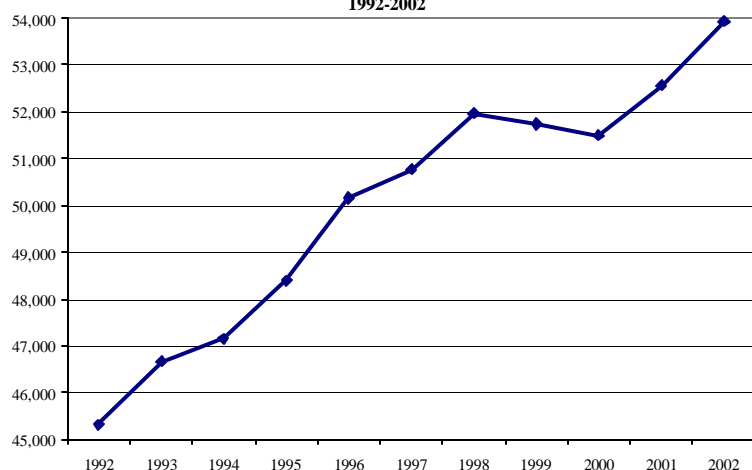
# An Overview of Health

Rhode Island's health-related businesses employed 45,311 workers and accounted for 36.0 percent of all Services employment and 12.6 percent of the State's total private sector employment in 1992. By 2002, although comprising a smaller share of Services employment (34.4%), 13.3 percent of private sector jobs in the Ocean State were in Health Services. During this period, industry employers added 8,618 jobs (+19.0%) to the local economy. The only major industry group to add more jobs between 1992 and 2002 was Eating & Drinking Places (+8,931).

## Annual Average Employment in Health Services

1992	45,311
1993	46,673
1994	47,149
1995	48,389
1996	50,160
1997	50,768
1998	51,974
1999	51,737
2000	51,494
2001	52,567
2002	53,929

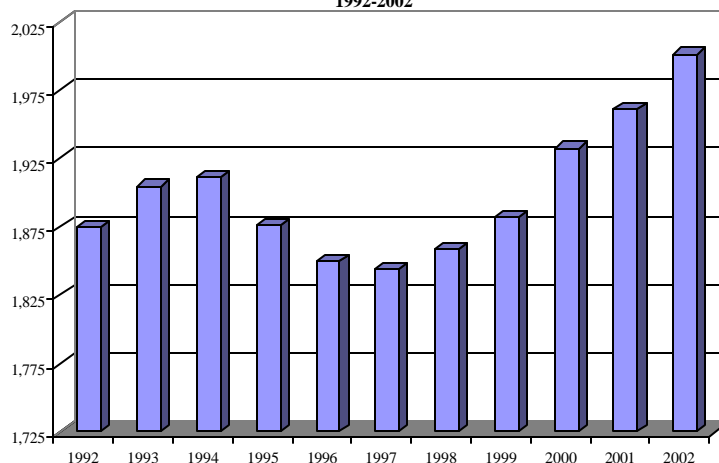
Average Annual Employment in Health Services  
1992-2002



On an annual basis, the largest single-year increase occurred between 1995 and 1996 when an additional 1,771 jobs were reported by employers. Although yearly employment decreased slightly between 1998 and 1999 (-237) and again between 1999 and 2000 (-243), employment gains of more than 1,000 jobs have been reported each year since.

The number of Health Services establishments grew as well during the period, increasing by 6.8 percent (+127). More than 16 percent of all Services firms and 6 percent of all private sector firms were engaged in health-related activities in 2002. Although the number of firms in this sector declined between 1995 and 1997, it has since risen steadily to more than 2,000 firms, adding an average of 36 firms per year from 1998 to 2002.

Average Number of Health Services Firms  
1992-2002



# Services in Rhode Island

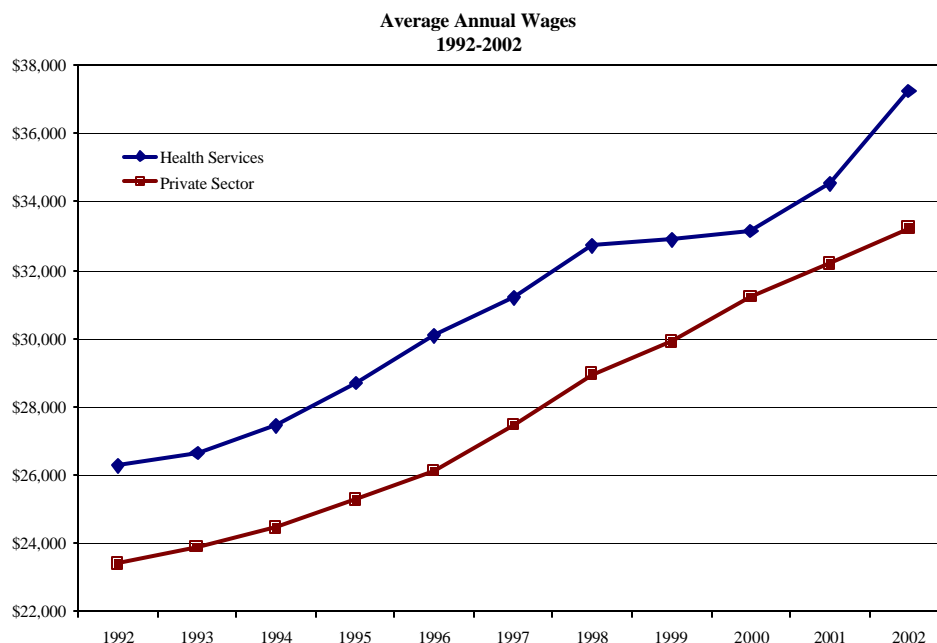
## Top 10 Major Industry Groups by Annual Average Employment Gain 1992-2002

+8,931	Eating & Drinking Places
<b>+8,618</b>	<b>Health Services</b>
+5,790	Social Services
+5,426	Business Services
+5,230	Special Trade Contractors
+3,533	Miscellaneous Retail
+2,781	Security & Commodity Brokers, Dealers & Services
+2,211	Food Stores
+2,156	Membership Organizations
+1,939	Amusement & Recreation

## Annual Average Wages in Services' Major Industry Groups 2002

\$50,153	Legal Services
\$47,860	Engineering, Accounting & Research
\$39,830	Miscellaneous Services
<b>\$37,255</b>	<b>Health Services</b>
\$35,324	Education Services
\$33,257	Business Services
\$32,331	Miscellaneous Repair Services
\$27,150	Automotive Repair Services
\$20,850	Social Services
\$20,635	Hotels & Lodging Places

Employment growth has been accompanied by higher annual average wages for workers in these industries. In 1992, Health Services employers paid in excess of \$1.19 billion in total wages to their workers, resulting in an annual average wage of \$26,274 per employee. During that year, private sector workers averaged \$23,391 in annual wages.



A decade later, the annual average wage in Health Services (\$37,255) had increased by 41.8 percent (+\$10,981) and was the fourth highest wage paid among the sixteen major industry groups in the Services sector. Similar growth rates were experienced across the private sector, as its average annual wage (\$33,226) increased by 42.0 percent (+\$9,835) during the period. By 2002, total wages paid to Health Services workers exceeded \$2.0 billion, the most paid by any major industry group. This accounted for 15.0 percent of all private sector wages paid in the Ocean State.

# Health Services

The Standard Industrial Classification (SIC) system divides Health Services into nine industry groups. The following is a list of these industries with a brief summary of the services provided by each:

\* **Offices & Clinics of Doctors & Nurses** includes ambulatory surgical centers, clinics of physicians, and the offices of doctors (M.D.) “engaged in the practice of general or specialized medicine and surgery.”

\* **Offices & Clinics of Dentists** is comprised of establishments “engaged in the practice of general or specialized dentistry, including dental surgery,” such as orthodontists, periodontists and oral pathologists.

\* **Offices & Clinics of Doctors of Osteopathy** includes the establishments of physicians with the degree of D.O.

## Standard Industrial Classification System (SIC)

The structure of the SIC coding system makes it possible to analyze and provide industry data by *Major Industry Division or Sector*, *Major Industry Group*, *Industry*, and *Industry Code*.

For example:

**Services Division or Sector**  
**Health Services**  
**Hospitals**



\* **Offices & Clinics of Other Health Practitioners** includes chiropractors, optometrists, podiatrists and other health practitioners not elsewhere classified, such as acupuncturists, dieticians, midwives, paramedics and clinical psychologists.

\* **Nursing & Personal Care Facilities** includes “establishments primarily engaged in providing inpatient nursing and health-related personal care,” such as nursing homes, domiciliary care and other extended care facilities.

\* **Hospitals** is comprised of general medical and surgical hospitals, psychiatric hospitals and specialty hospitals, such as rehabilitation, children’s cancer and maternity hospitals.

\* **Medical and Dental Laboratories** includes facilities providing laboratory services to the medical profession, such as blood analysis, x-rays and urinalysis, and “establishments primarily engaged in making dentures, artificial teeth and orthodontic appliances to order for the dental profession.”

\* **Home Health Care Services** is comprised of “establishments primarily engaged in providing skilled nursing or medical care in the home, under the supervision of a physician.”

\* **Miscellaneous Health and Allied Services** includes those services not elsewhere classified, such as kidney dialysis centers, birth control clinics, outpatient detoxification centers, blood banks and childbirth preparation classes.





# Employment by Industry

Between 1992 and 2002, all nine Health Services industries reported increased employment levels. Hospitals added 2,668 jobs during this period, followed by Offices & Clinics of Doctors & Nurses (+2,237) and Nursing & Personal Care Facilities (+1,192). The smallest employment gains occurred in Miscellaneous Health & Allied Services (+19) and Offices & Clinics of Doctors of Osteopathy (+58).

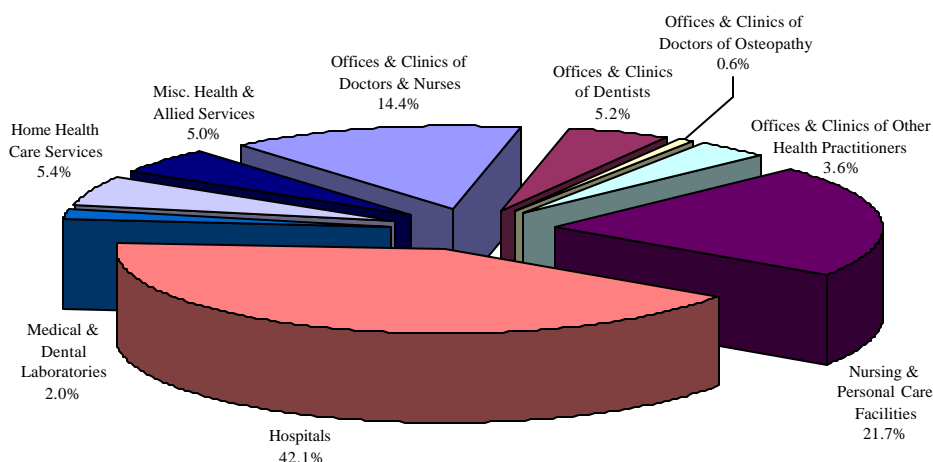
**Annual Average Employment in Health Services Industries**

<i>Industry</i>	<i>1992</i>	<i>2002</i>	<i>Change</i>	<i>% Change</i>
Offices/Clinics of Doctors & Nurses	5,515	7,752	<b>2,237</b>	<b>40.6%</b>
Offices/Clinics of Dentists	2,161	2,807	<b>646</b>	<b>29.9%</b>
Offices/Clinics of Doctors of Osteopathy	255	313	<b>58</b>	<b>22.7%</b>
Offices/Clinics of Other Health Practitioners	1,338	1,953	<b>615</b>	<b>46.0%</b>
Nursing & Personal Care Facilities	10,526	11,718	<b>1,192</b>	<b>11.3%</b>
Hospitals	20,033	22,701	<b>2,668</b>	<b>13.3%</b>
Medical & Dental Laboratories	880	1,064	<b>184</b>	<b>20.9%</b>
Home Health Care Services	1,932	2,931	<b>999</b>	<b>51.7%</b>
Misc. Health & Allied Services	2,672	2,691	<b>19</b>	<b>0.7%</b>

Distribution of Health Services employment has remained relatively constant during the past decade. Hospitals have accounted for the largest share of health-related jobs in the Ocean State, comprising 42.1 percent of annual average Health Services employment in 2002. The second largest industry, Nursing & Personal Care Facilities, comprised 21.7 percent of health-related jobs in 2002, followed by Offices & Clinics of Doctors & Nurses (14.4%) and Home Health Care Services (5.4%).

Between 1992 and 2002, Offices & Clinics of Doctors & Nurses (+2.2 percentage points) and Home Health Care Services (+1.1 percentage points) increased their share of Health Services employment. During this period, the employment share of Hospitals decreased by 2.1 percentage points, while Nursing & Professional Care Facilities (-1.5 percentage points) reported a similar decline.

**RI Health Services Employment by Industry, 2002**



# Wages by Industry

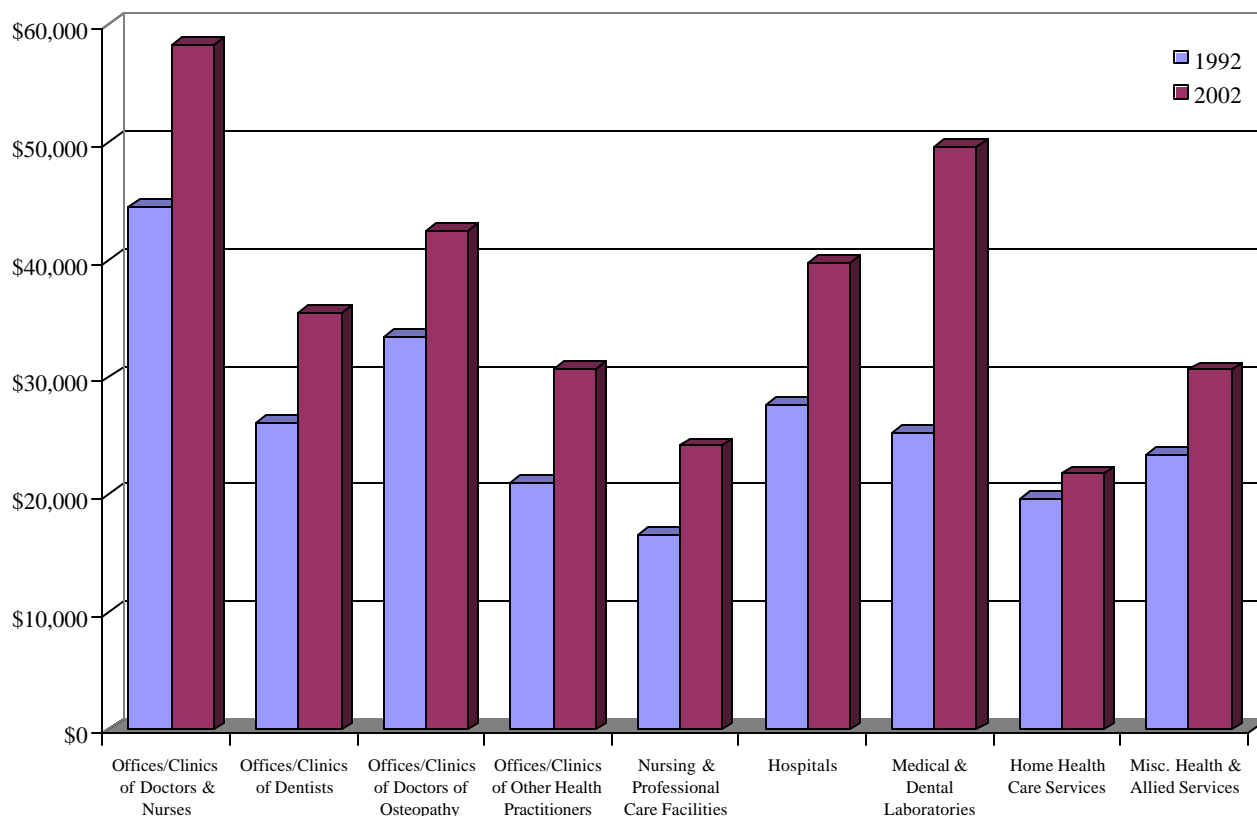
Between 1992 and 2002, Medical & Dental Laboratories employees nearly doubled (+\$24,320) their annual average wage. This industry reported the largest pay increase of the nine health-related industries. Workers in Offices & Clinics of Doctors & Nurses (+\$13,737) and Hospitals (+\$12,068) also reported notable wage gains. Firms engaged in providing Home Health Care Services (+\$2,079) reported the smallest increase in annual average wages during this period.

## Increase in Annual Average Wages by Industry, 1992-2002

\$ 24,320	Medical & Dental Laboratories
\$ 13,737	Offices/Clinics of Doctors & Nurses
\$ 12,068	Hospitals
\$ 9,682	Offices/Clinics of Other Health Practitioners
\$ 9,431	Offices/Clinics of Dentists
\$ 9,028	Offices/Clinics of Doctors of Osteopathy
\$ 7,579	Nursing & Professional Care Facilities
\$ 7,190	Misc. Health & Allied Services
\$ 2,079	Home Health Care Services

On a percentage basis, Medical & Dental Laboratories (+96.2%) workers reported the largest wage increase, followed by employees of Offices & Clinics of Other Health Practitioners (+46.0%), Nursing & Professional Care Facilities (+45.7%) and Hospitals (+43.7%). The smallest percentage increases were reported by Home Health Care Services firms, whose employees experienced a 10.5 percent rise in annual average wages.

Annual Average Wages in Health Services Industries  
1992 - 2002





# Offices & Clinics of Doctors & Nurses

Between 1992 and 2002, Offices & Clinics of Doctors & Nurses added 2,237 (+40.6%) jobs to the local economy, representing the second highest job gain among the nine Health Services industries.



The employment increase between 1998 and 1999 resulted from a coding change which moved HMO firms from Miscellaneous Health & Allied Services to this industry. One year later, annual average employment decreased, reflecting the closing of a major firm in Rhode Island.

As a whole, the 810 firms in this industry paid wages in excess of \$452 million in 2002. This was the second highest total among all Health Services industries and represented an 83.9 percent increase over total wages paid in 1992.

In 2002, employees of Offices & Clinics of Doctors & Nurses (\$58,314) earned the highest annual average wage within Health Services. This represented a 30.8 percent increase over the industry's 1992 annual average wage of \$44,577.

	<u>Employment</u>	<u>Wages</u>
1992	5,515	\$ 44,577
1993	5,654	\$ 44,867
1994	5,759	\$ 46,158
1995	5,976	\$ 48,474
1996	6,382	\$ 50,025
1997	6,542	\$ 52,790
1998	6,883	\$ 54,517
1999	8,015	\$ 52,844
2000	7,335	\$ 55,544
2001	7,449	\$ 55,999
2002	7,752	\$ 58,314

# Offices & Clinics of Dentists

Employment in Offices & Clinics of Dentists increased by 29.9 percent between 1992 and 2002, adding 646 jobs to the local economy. This gain helped raise the industry's share of Health Services employment from 4.8 percent to 5.2 percent by the end of the period.

The 402 firms comprising this industry paid \$99.8 million in wages during 2002, a 76.8 percent increase over its 1992 total of \$56.5 million.

On average, employees of Offices & Clinics of Dentists earned an annual wage of \$35,564 in 2002. This is \$9,430 more than the annual average wage earned in 1992, representing a

36.1 percent increase. However, these gains were not enough to keep the industry's annual average wage from falling to the fifth highest among the nine Health Services industries.

	<u>Employment</u>	<u>Wages</u>
1992	2,161	\$ 26,134
1993	2,192	\$ 25,914
1994	2,289	\$ 26,606
1995	2,372	\$ 27,144
1996	2,485	\$ 27,715
1997	2,552	\$ 28,246
1998	2,628	\$ 29,900
1999	2,661	\$ 31,152
2000	2,689	\$ 33,517
2001	2,731	\$ 34,256
2002	2,807	\$ 35,564



# Offices & Clinics of Doctors of Osteopathy

	<u>Employment</u>	<u>Wages</u>
1992	255	\$ 33,474
1993	239	\$ 37,250
1994	289	\$ 36,519
1995	292	\$ 39,385
1996	299	\$ 39,751
1997	329	\$ 42,363
1998	331	\$ 44,122
1999	311	\$ 44,279
2000	313	\$ 45,115
2001	301	\$ 43,152
2002	313	\$ 42,502

In terms of employment, Offices & Clinics of Doctors of Osteopathy represents the smallest industry within Health Services, accounting for less than one percent of health-related jobs in 2002. Annual average employment increased by 22.7 percent between 1992 to 2002 with the addition of 58 jobs. By the end of the period, more than 300 people were working in this industry throughout the Ocean State.

While total employment levels remain low, workers in this industry average the third highest annual wage in Health Services. In 2002, the annual average wage equaled \$42,502, a \$9,000

increase over its 1992 level. However, this 27.0 percent change was the second smallest percentage gain reported among the nine Health Services industries, just ahead of Home Health Care Services (+10.5%).



## Offices & Clinics of Other Health Practitioners

Offices & Clinics of Other Health Practitioners added 615 jobs to the Rhode Island economy between 1992 and 2002, a 46.0 percent increase. The industry accounted for 3.6 percent of the State's Health Services employment in 2002, a 0.6 percentage point increase over its 1992 share.



The industry's annual average wage increased by nearly \$9,700 between 1992 and 2002, a 46.0 percent increase. This gain represented the second highest percentage increase in wages within Health Services, trailing Medical & Dental Laboratories (+96.2%). By the end of this period, Offices & Clinics of Other Health Practitioners paid the sixth highest annual average wage of the nine health-related industries highlighted.

	<u>Employment</u>	<u>Wages</u>
1992	1,338	\$ 21,058
1993	1,322	\$ 21,501
1994	1,138	\$ 22,694
1995	1,216	\$ 24,071
1996	1,271	\$ 25,431
1997	1,305	\$ 26,131
1998	1,390	\$ 27,603
1999	1,411	\$ 28,243
2000	1,467	\$ 29,314
2001	1,648	\$ 29,469
2002	1,953	\$ 30,740

# Nursing & Personal Care Facilities

In 2002, more than 11,700 people worked in Rhode Island's Nursing & Personal Care Facilities, making it the State's second largest Health Services industry in terms of employment. Overall,



21.7 percent of health-related jobs fell into this category, a slight decrease from its 1992 share of 23.2 percent. The addition of 1,192 (+11.3%) jobs between 1992 and 2002 was the third largest gain within Health Services, trailing Hospitals (+2,668) and Offices & Clinics of Doctors & Nurses (+2,237).

	<u>Employment</u>	<u>Wages</u>
1992	10,526	\$ 16,596
1993	10,549	\$ 17,015
1994	10,682	\$ 17,303
1995	11,093	\$ 17,864
1996	11,390	\$ 18,190
1997	11,134	\$ 18,889
1998	11,545	\$ 19,810
1999	11,652	\$ 20,735
2000	11,547	\$ 21,773
2001	11,510	\$ 23,013
2002	11,718	\$ 24,176

The industry also reported a notable increase in its annual average wage. In 1992, Nursing & Personal Care Facilities employees earned \$16,596. By 2002, the average had increased to \$24,176, a 45.7 percent gain and the third highest percentage increase of the health-related industries. However, despite this growth, the industry's annual average wage remained one of the lowest within Health Services. Only Home Health Care Services (\$21,803) workers were paid a lower annual average wage in 2002.

## Hospitals

With more than 22,700 employees in 2002, Hospitals remained the largest Health Services employer in the Ocean State. This industry added 2,668 (+13.3%) jobs between 1992 and 2002. Overall, Hospitals accounted for 42.1 percent of health-related employment in 2002, a slight decline from its 1992 share of 44.2 percent.

	<u>Employment</u>	<u>Wages</u>
1992	20,033	\$ 27,639
1993	20,307	\$ 27,787
1994	20,209	\$ 29,118
1995	20,272	\$ 30,160
1996	20,715	\$ 32,147
1997	20,872	\$ 33,991
1998	21,173	\$ 35,489
1999	21,115	\$ 34,765
2000	21,496	\$ 33,848
2001	22,436	\$ 35,214
2002	22,701	\$ 39,706

Between 1992 and 2002, the annual average wage paid to Hospital workers increased by more than \$12,000, a 43.7 percent increase and the third largest numerical gain realized among the nine health-related industries. By the end of this period, Hospital employees earned the fourth highest annual average wage in Health Services.



Overall, the 29 firms in the Hospitals industry paid total annual wages in excess of \$901 million in 2002, nearly double that of the next highest industry, Offices & Clinics of Doctors & Nurses (\$452 million).

# Medical & Dental Laboratories

In 2002, Medical & Dental Laboratories employed the second fewest people in Health Services. The industry's 1,064 employees trailed only Offices & Clinics of Doctors of Osteopathy (313) in terms of size. A total of 184 Laboratories jobs were added to the local economy between 1992 and 2002, a 20.9 percent increase.



Overall, 2.0 percent of health-related employment fell into this industry, a 0.1 percentage point increase over its 1992 level.

Although the industry posted small employment gains during this period, its wages increased significantly. In 1992, employees in Medical & Dental

Laboratories earned an annual average wage of \$25,293. By 2002, the average wage had nearly doubled to \$49,613 -- the second highest wage paid among the nine health-related industries. Furthermore, this 96.2 percent increase was the largest percentage gain within Health Services during the period.

	<u>Employment</u>	<u>Wages</u>
1992	880	\$ 25,293
1993	959	\$ 29,099
1994	834	\$ 30,478
1995	840	\$ 32,010
1996	799	\$ 34,714
1997	852	\$ 35,776
1998	804	\$ 32,660
1999	932	\$ 38,495
2000	1,029	\$ 40,449
2001	1,024	\$ 48,495
2002	1,064	\$ 49,613

# Home Health Care Services

	<u>Employment</u>	<u>Wages</u>
1992	1,932	\$ 19,725
1993	2,367	\$ 19,578
1994	2,634	\$ 19,680
1995	2,872	\$ 19,952
1996	3,076	\$ 20,474
1997	3,332	\$ 20,619
1998	3,354	\$ 21,084
1999	3,287	\$ 19,934
2000	3,228	\$ 19,575
2001	2,929	\$ 21,583
2002	2,931	\$ 21,803

Comprising 5.4 percent of Health Services employment, Home Health Care Services is the fourth largest health-related industry in the Ocean State. In 2002, more than 2,900 people were employed by Home Health Care firms, a 51.7 percent increase over the 1,932 workers reported in 1992. This percentage gain was the largest within Health Services between 1992 and 2002.

On average, Home Health Care Services employees earned \$21,803 in 2002 -- the lowest annual average wage within Health Services during that year. Between 1992 and 2002, annual average wages increased by \$2,078, a 10.5 percent change. These were the smallest wage gains (both numerically and percentage wise) reported

among the nine health-related industries. Overall, firms engaged in Home Health Care Services paid total wages in excess of \$63.9 million in 2002, a 67.7 percent increase over total payments made to industry employees in 1992.





# Miscellaneous Health & Allied Services

Of the nine Health Services industries, Miscellaneous Health & Allied Services reported the smallest increase in jobs between 1992 and 2002. During this period, just 19 jobs were added to the local economy, an anemic 0.7 percent increase. The notable decline in employment between 1998 and 1999 resulted from a coding change which moved HMO firms from this industry to Offices & Clinics of Doctors & Nurses. Overall, Miscellaneous Health & Allied Services accounted for 5.0 percent of Rhode Island's health-related employment in 2002.



Between 1992 and 2002, the annual average wage paid to employees in this industry increased by 30.6

percent. However, this \$7,190 gain was the second smallest wage increase reported in the Health Services group during the period. Overall, the 86 firms providing Miscellaneous Health & Allied Services within the Ocean State paid total wages in excess of \$82.5 million in 2002.

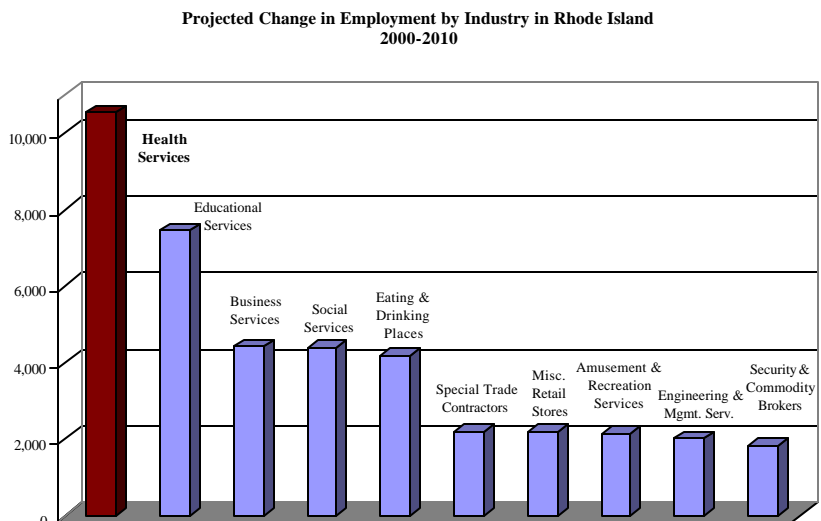
	<u>Employment</u>	<u>Wages</u>
1992	2,672	\$ 23,477
1993	3,084	\$ 25,198
1994	3,316	\$ 24,256
1995	3,455	\$ 28,791
1996	3,744	\$ 30,070
1997	3,851	\$ 25,723
1998	3,864	\$ 30,125
1999	2,353	\$ 27,240
2000	2,390	\$ 28,415
2001	2,540	\$ 29,609
2002	2,691	\$ 30,667

## A Diagnosis for the Future

Comprising 13.3 percent of private sector employment in Rhode Island, Health Services represents a vital segment of our State's economy. Individually, and as a whole, health-related industries have shown considerable job and wage growth during the past decade, providing Ocean State residents and their neighbors with an additional 8,600 jobs between 1992 and 2002.

To examine what the future may hold for Health Services, the following highlights industry and occupational employment

projections through 2010. The synthesis of past, present, and future employment trends makes it clear that Health Services is at the heart of Rhode Island's economic stability and provides Ocean State workers, employers, and policy makers with hope for continued prosperity into the future.



# Health Services in 2010

Rhode Island's industry projections (2000-2010) show a 19.4 percent increase in Health Services employment by 2010. This 10,533 job increase is the largest projected among all major industry groups, surpassing employment gains in Educational Services (+7,447), Business Services (+4,416), Social Services (+4,389) and Eating & Drinking Places (+4,175). It is projected that total health-related employment in the Ocean State will surpass 64,700 jobs within the decade and remain the largest major industry group in Rhode Island. Overall, projections show that Health Services could comprise 11.7 percent of total statewide employment (public & private) by 2010.

On an occupational basis, five of the top fifty occupations with the largest projected growth are health-related. These include Registered Nurses (1st), Nursing Aides, Orderlies & Attendants (6th), Medical Assistants (28th), Home Health Aides (34th), and Pharmacy Technicians (41st).

Significant employment growth is also projected for Cardiovascular Technologists & Technicians (+42.1%), Dietetic Technicians (+32.8%), Surgical Technologists (+27.5%), Emergency Medical Technicians & Paramedics (+20.3%), Medical & Clinical Laboratory Technicians (+12.2%) and Technologists (+12.8%), and Family & General Practitioners (+10.7%).

## Projected Growth Rate and Current Wages for Selected Health Occupations, 2000-2010

<i>Occupation</i>	<i>Projected Growth</i>	<i>2001 Wage</i>
Registered Nurses	22.8%	\$ 50,357
Nursing Aides, Orderlies & Attendants	21.0%	\$ 21,715
Medical Assistants	45.8%	\$ 22,589
Home Health Aides	16.9%	\$ 22,027
Pharmacy Technicians	39.8%	\$ 19,989
Licensed Practical & Licensed Vocational Nurses	10.4%	\$ 40,352
Medical Records & Health Information Technicians	33.5%	\$ 28,038
Pharmacists	15.3%	\$ 70,741
Physical Therapists	29.7%	\$ 55,786
Radiologic Technologists & Technicians	19.1%	\$ 42,016
Dental Hygienists	25.2%	\$ 52,707
Respiratory Therapists	38.0%	\$ 41,600
Dental Assistants	14.4%	\$ 31,554



Industry projection data for Health Services includes Government hospital employees. Annual average employment figures listed elsewhere in this publication are based upon private Covered Employment and Wage data, which excludes Government hospital employees. For this reason, it is not possible to directly compare these statistical data sets. For more information regarding Industry & Occupational Projections, please visit [www.dlt.ri.gov/lmi/proj.htm](http://www.dlt.ri.gov/lmi/proj.htm).



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- Data sources  
Covered Employment and Wage Program (ES-202)  
Industry and Occupational Projections Program  
Industry summaries are taken from the Standard Industrial Classification Manual (1987).
- This publication was written and designed by Nick Ucci, Principal Research Technician.

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